Information you should know prior using the SPIRIT Automated e-Procurement System.

Internet settings for Temporary Internet Files in your internet browser should be set to check for newer versions of stored pages every visit to the page.

SPIRIT is best viewed with a screen area setting of 1024 x 768 pixels or greater.

From the moment a user logs in, he or she has a session time of 180 minutes or three hours. For this reason it is suggested that you save any work done as often as is convenient to avoid losing it. If you leave your workstation, submit as draft and log out so as not to lose track of time, this way you begin each session with a new three hour window.

The user that initiates a proposal is the only user within a company that can edit a proposal draft. Others with User IDs within the company can view the proposal, but not edit.

The SPIRIT Questionnaire answer fields are each limited to 25k of data for your response(s). The application will make you aware of the limit being exceeded when you submit the questionnaire as draft or complete.

This document is intended to give you a general feel for a solicitation and proposal within the SPIRIT Automated e-Procurement System.

It is also intended to clarify the steps you must take in satisfying the functionality of the application. These steps exclude any instructions a Procurement Officer (PO) may include in a solicitation.

What is meant by "exclude any instructions a Procurement Officer (PO) may include," is that regardless of what a particular PO requires you to do in submitting a complete proposal; the application requires completion of various parts of your proposal before you will be allowed to submit the proposal as complete.

As an introduction, SPIRIT has four (4) must completes with the possibility of five (5). The fifth possibility is the SPIRIT questionnaire, which will be covered with the other four.

> Question: What are "must completes?"

> Answer: "Must completes" are pieces of your proposal that must be filled in and/or must have a complete "status" before the application will accept any proposal as complete; thereby allowing you to submit a proposal with the hope of receiving a positive evaluation leading to a contract.

The must completes in order of appearance are:

> > Offer – this is the Offer and Acceptance form

> > Price Sheet which includes line items, each of which must have a complete status

> > Questionnaire, which is the "possibility" since the application does not require that a PO include one with a solicitation. If included with a solicitation, SPIRIT requires that it have a complete status.

> > Payment Terms: i.e. net 30 days

> > Delivery: days for delivery after receipt of order.

PLEASE NOTE THAT PAYMENT AND DELIVERY ARE IN THE SAME SECTION.

On the next page we will begin going over the solicitation with images as reference and brief descriptions. The above mentioned will be covered following the solicitation.

THE SOLICITATION

The following will be a solicitation amendment broken into sections with basic description where deemed necessary. A solicitation amendment was chosen as the example because it is the same as the initial solicitation with one small additional section that should be clarified.

Note that if you are responding to a solicitation and an amendment is issued, your work to date will be duplicated and linked to the active solicitation amendment document. There are two exceptions to the previous statement; these being the SPIRIT price sheet and SPIRIT questionnaire. However, if neither the SPIRIT price sheet nor SPIRIT questionnaire is changed by the amendment, your work to date in those sections will be duplicated. More on the SPIRIT price sheet and SPIRIT questionnaire when we reach that section.

When an amendment is published, the original solicitation or previous amendment is no longer the active document and is cancelled by the system. So you do not need to be concerned that this new document replaces the previous as this latest one encompasses all relevant information necessary to the solicitation with corrections.

When you first visit a solicitation, whether by e-mail notification or through viewing "Open Solicitations;" information will be contained throughout the main document, all of which, is fairly self explanatory.

Image above:

   1 –To create a proposal draft, simply click on the Submit Proposal link. This will generate a draft proposal for you to work on and eventually submit as complete. Note that if you already have a proposal draft the submit proposal link will read View My Proposal.

   2. –Created by: indicates the Procurement Officer (PO) that generated and published the solicitation. Note that the name (in this instance a dummy user for the purpose of testing the application), is a link. Clicking on the link will bring you to a screen in SPIRIT that contains this persons contact information should you have any questions or need clarification.

Solicitation Information			
PO Assigned:	Primary Procurement Officer/ADSM-6BTMQ6		
PM Assigned:	Primary Procurement Manager/ADSM-6BTMQ6	PA Assigned:	Primary Procurement Administrator/ADSM-6BTMQ6
Priority Solicitation:	No	Review by Date:	10/01/2005
Contract Type:	Agency	Date To Close:	12/01/2005 01:00 PM
Include Questionnaire?		No	
Solicitation Title:	Secondary admin view test		
Description:	Detailed description of the "need" behind the solicitation		

This next section of the solicitation includes a little more information about the document. Two areas that warrant clarification:

1 –Most of the info under number 1 is of concern to internal staff only; they are Priority Solicitation, Review by Date.

Include Questionnaire is of internal interest and can be confusing to the supplier community. In the image above, the SPIRIT questionnaire was not used (indicated by No to it's right), however, this does not mean that the PO did not include a questionnaire of their own in the attachment section of the solicitation that will be required by the PO for a complete proposal. As an attached questionnaire is not part of the application, the "No" is not relevant to one, nor will SPIRIT require its completion.

Contract Type is of internal interest, but may be of interest to you also as far as getting an idea of how large a contract this solicitation may end up being, in most instances Statewide contracts would be of a higher monetary value to the supplier community.

Date To Close is definitely of interest to you since if you don't meet the close date, your proposal will be rejected. Note that the 01:00 PM close time was only used in the test environment and you will normally see 03:00 PM there for formal solicitations (IFBs and RFPs) and 05:00 PM for informals (RFQs).

2 –Description will contain basic information as an introduction to the solicitation. This is helpful to many as it negates the need to read the entire solicitation to find out if it is something your company wants to respond to.

Amendment Information	
This area contains "sample language," however, in the case of a real amendment, the PO would describe what has been changed in the solicitation by the publication of this amendment	
Has the Price Sheet Been Changed?	No
Has the Questionnaire Been Changed?	No

The Amendment Information field should contain information regarding changes to the solicitation.

<u>"Has the Price Sheet Been Changed?" and "Has the Questionnaire Been Changed?"</u>

This information is what the SPIRIT system needs to know from the PO. If the PO changes the SPIRIT price sheet or SPIRIT questionnaire, the application will not duplicate your work to date in those sections when the amendment is published. So in one instance, it is good for you to know that neither of these sections changed, however, if either indicated Yes, the PO should indicate to you that they have changed, and how in the Amendment Information field. It would then be necessary for you to re-enter data in those sections.

These two questions and answers can cause confusion and is mainly based on differing points of view between the PO, SPIRIT and the supplier community.

You will want to pay close attention to:

1. Special Instructions to Offerors, whether in an attachment or included in the SPIRIT Special Instructions to Offerors.

2. SPIRIT Price Sheet and a possible attached Price Sheet (Word format likely). Commodity Codes (CCs) are what the system uses to identify the appropriate supplier audience for a particular solicitation. This sometimes requires multiple CCs in a given solicitation. In the SPIRIT Price Sheet there then must be at least one line item for each CC included. SPIRIT functionality requires that data be entered in these line items and that they are submitted with a complete status.

    The confusion enters the mix if the PO has attached a price sheet in addition to the SPIRIT applications. Let's say the PO has made a change to the attached price sheet and indicates in the Amendment Information field that this is the case. You may notice that the cover of the solicitation indicates NO. This is because the SPIRIT price sheet has not been changed, so you have no issue there, but please do be aware that you will need to address the change in the attached price sheet.

3. SPIRIT Questionnaire and a possible attached Questionnaire (Word format likely). The same type of scenario is possible with the questionnaire as with the price sheet as described in number 2. Granted, no CCs are necessary to the questionnaire, however, the PO may have attached a questionnaire in a Word file. So again, the PO tells you in the amendment that it has changed, yet according to the cover it has not.

None of this is as confusing as it may appear according to the above. Being aware of the variables is extremely helpful. Best bet is to get a good grasp of the RFP itself; you can then take some time to understand what may be attached in addition to any SPIRIT parts.

Clauses

Sections

Special Instructions
Special Terms and Conditions
Uniform Instructions
Uniform Terms and Conditions

[Price Sheet]   [Scope/Specification]

Attachments

http.doc
SPO060001-A1_SOL.pdf

The rest of the solicitation looks like the above. The clauses section contains links, clicking on the links opens a window that contains those clauses. Each clause from within that window is a link as well. The clauses in their entirety are also contained in the PDF (described below), unless additional instructions have been attached to the solicitation by the PO.

Note the PDF in the attachment section. This PDF is generated when the PO publishes the solicitation. The PDF itself contains all the information in the solicitation with the exception of attachments. So, in order to print up the entire solicitation (if you want to), you would need to print the PDF and all other attachments.

THE PROPOSAL

Recall that your proposal draft is generated from the solicitation by clicking on the Submit Proposal link at its top center.

Note that when you initially create a proposal draft it will be in Edit mode. When you submit changes as draft and return to the proposal, it will be in View mode. In order to return to Edit mode it is necessary click on the Edit Icon (red pencil), located near the top right corner of your proposal.

Above is a view of the top of your proposal draft

1. Edit icon – as mentioned previously, click on it to edit your proposal

2. Cancel button – this button is used to cancel your proposal, HOWEVER, it serves a second use after you have submitted a proposal as complete.

    Once a proposal has been submitted as complete you no longer have edit rights over it. However, if you find that you need to or would like to make changes to your submitted proposal (provided the solicitation is still open), you can go into your proposal and click on the Cancel button and it is cancelled. Once cancelled, the cancel button becomes a Reinstate button, clicking on reinstate returns your proposal back to you in edit mode so you can edit as appropriate. Note that it must be resubmitted as complete to prior to the close date/time of the solicitation.

3. Total Price – total price is the total of the amounts you enter in each line item. This is calculated by SPIRIT during the course of your working on your proposal.

This next section of the proposal below is in reference to the solicitation your proposal is to.

Solicitation			
General Information			
Title	Secondary admin view test		
Solicitation Number:	SPO060001-A1	Solicitation Type:	IFB
Procurement Officer:	Primary Procurement Officer/ADSM-6BTMQ6		
Description			
	Detailed description of the "need" behind the solicitation		
Amendment Information			
This area contains "sample language," however, in the case of a real amendment, the PO would describe what has been changed in the solicitation by the publication of this amendment			
Clauses			
Special Instructions			
Special Terms and Conditions			
Uniform Instructions			
Uniform Terms and Conditions			

Note that the solicitation number in the image above is a link so that you can return to it for reference from your proposal.

Also the Clauses are links here as well. Remember though that the PO may have attached additional clauses to the solicitation in Word documents; these should however, be referenced in some fashion in the instructions as written by the PO.

To Do List			
Initially Required Items			
Item			Status
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Pending
3. Questionnaire	----------	----------	----------

The next area of your proposal contains the area where you will do most of your work on the proposal in SPIRIT. Each of these pieces must be filled out and completed before your proposal can be submitted as complete. If you do not, SPIRIT will prompt you that whatever it is that has not been completed is not completed.

1. Offer refers to the Offer and Acceptance, which must be filled out and accepted. The Status will read Complete when completed.

2. Price Sheet is addressed by clicking on the View link. The Status will read Complete when completed. Remember that this is the SPIRIT Price Sheet and any price sheet(s) attached to the solicitation does not mean the SPIRIT Price Sheet does not need to be completed. SPIRIT doesn't know or care about any others, though the PO will. More on the price sheet further on.

3. Questionnaire – note that there is no View link for the questionnaire, this indicates that there is no SPIRIT questionnaire for this solicitation, however the PO may have opted to attach a questionnaire to the solicitation rather than use the SPIRIT one.

THE PRICE SHEET

A new window will open upon clicking the View link for the SPIRIT Price Sheet:

1. Price Sheet instructions will be listed in this area; however do be aware the PO may attach additional pricing requirements to the solicitation as well as in the Special Instructions.

2. LI # - this number is a link and will open a window containing the line item where you will enter your data where necessary. A little more on this below.

   The red dot indicates this as a required element of the solicitation. It also indicates that the LI status is Draft. Once an LI has been submitted as complete this dot will no longer be present. This is extremely helpful in a solicitation with numerous line items.

3. Cm Code # and Cm Code Item # - Commodity Code Number (CC) and Commodity Code Item Number (CCI). The CC is the eight digit level number that you register at, which in turn is what is used by the application when compiling the bidlist for a solicitation. The CCI is a number created internally that should indicate a particular item defined within the CC category.

THE LINE ITEM

Recall that the Price Sheet is one of the sections that must have a complete status before you will be able to submit your proposal as complete. This next view and description is of the Line Item (LI), window that opens when you click on the LI number. It is the LI (s) that must have a complete status that in turn indicates to the application that the price sheet is complete.

In the image below, only the Unit Price is a required field, however other possible fields might include; Manufacturer, Model, Catalog, etc.

1. Unit Price is the only open field that will allow the input of data. The Ext Price (extended price), is calculated by the application by multiplying the quantity (Qty) by the unit price entered.

2. Save as: this is the status the application will use when designating your price sheet as complete or not. For each LI in the SPIRIT price sheet the status must be changed by the user from Draft to Complete and submitted.

   Note that after submitting a LI as complete you can change the data you entered. Editing within your proposal is possible until it is submitted as a completed proposal.

   Remember as mentioned on the previous page that the red dot on the price sheet will no longer be present once submitted as complete.

   Also, as stated before, be sure that there is no attached price sheet to a solicitation that the PO requires being filled out. Also remember that SPIRITs functional concern are it's pieces regardless of what a PO requires or expects.

Contract Payment terms refer to any discount you may or may not offer, i.e. Net 30 Days or 2% 10 Days, Net 30.

Contract Delivery requires a numeric value. A.R.O. = After Receipt of Order.

Both the above fields are required fields as designated by the red dot. These fields may not be appropriate to a service offered, however they are a system requirement. If the PO assigned has not instructed what should be entered to satisfy the application, please contact them for an answer.

The Confidential Information section (image below), security hides any data entered in there by you. The information is viewable to the appropriate personnel only (POs, evaluators). If you consider a portion of your proposal confidential, cut that text from it's original document and paste it into this section. Please be sure to reference from where and what document it was removed from.


Note the scroll bar to the right of the number 1 above. If you begin pasting information within the field the scroll bar will become active to allow more data.

The Attachments section is next. One BIG key to remember when using the SPIRIT application is that it uses the same information highway that all websites do, so be aware of traffic. By this we mean do not wait until the last minute to complete your proposal, whether to submit pieces as complete or attach documents. Attachments can be a real bear depending upon their size. SPIRIT will allow attachments of up to 25mb each, however, this will not be a quick process as how quickly everything goes will depend upon many factors beyond our and your control.

You could be in the process of clicking on the submit button for your entire proposal, yet if this bit of information arrives at 3:00:01 MST your proposal will be rejected as missing the deadline. The process may take only a second, but every second counts.

It would be wise to note that during testing, it took roughly 3.5 minutes for a 6mb document to complete the attachment process. Again, many factors involved have nothing to do with your computer, our servers or networks; it could all boil down to a big news day with many users on-line trying to get at all of it.

See the next page for a brief description of how to add and remove attachments.
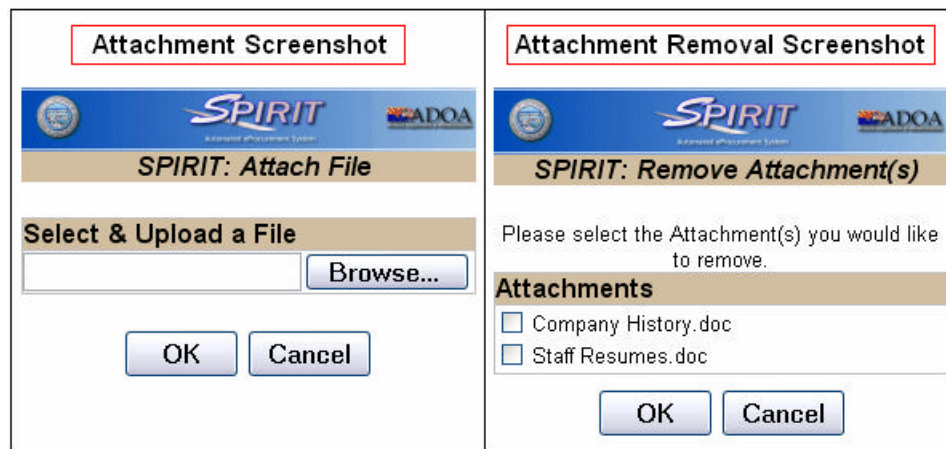
To add a document to your proposal, click on the Add button in the Attachment section of your proposal. A small window will open (image on left above). Click on the browse button and you will then need to locate the file at your location that you wish to attach. Once the file and its location is listed in the window to the left of the browse button, click on the OK button. Remember that once OK is clicked on that it may take a while for the process to complete. Float your mouse pointer over the Windows blue bar at the top of the window (not the blue SPIRIT logo bar), and you should notice the hour glass indicating that it is working on it. The process of attaching files is a lot like attaching files to an e-mail, however, with SPIRIT, they must be added one at a time.

To remove any files you have attached to your proposal, click on the Remove button in the Attachments section of your proposal. A small window will open (image on right above). A listing of the files you have attached will appear. Click in the checkbox to the left of each file that you wish to remove and click on the OK button.

Lastly you will need to change the status of your proposal from draft to complete and click on the submit button.

Solicitation and Proposal